

Welcome to our new Document Management Software **Filetrack**

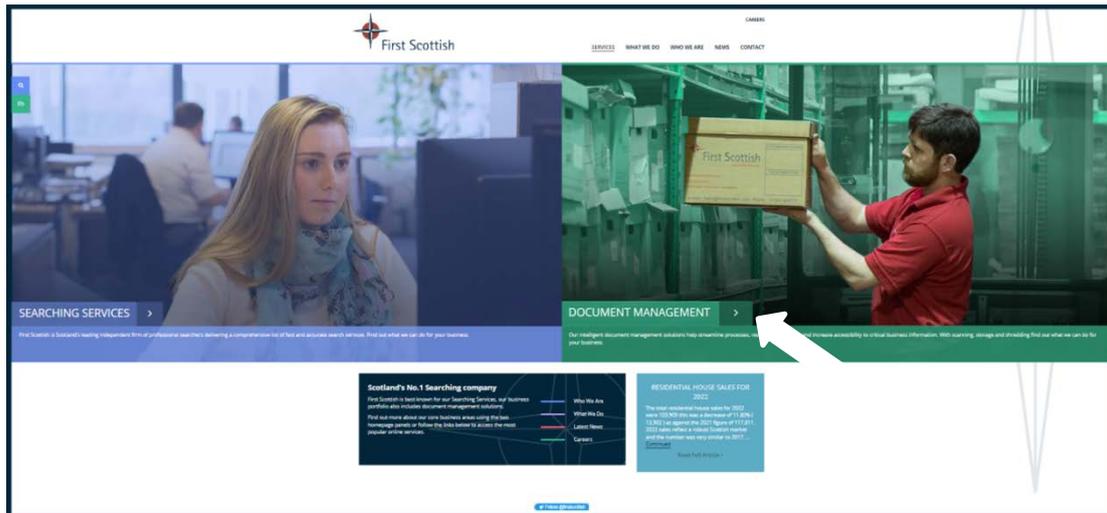
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FIRST SCOTTISH DOCUMENT MANAGEMENT WEB PORTAL

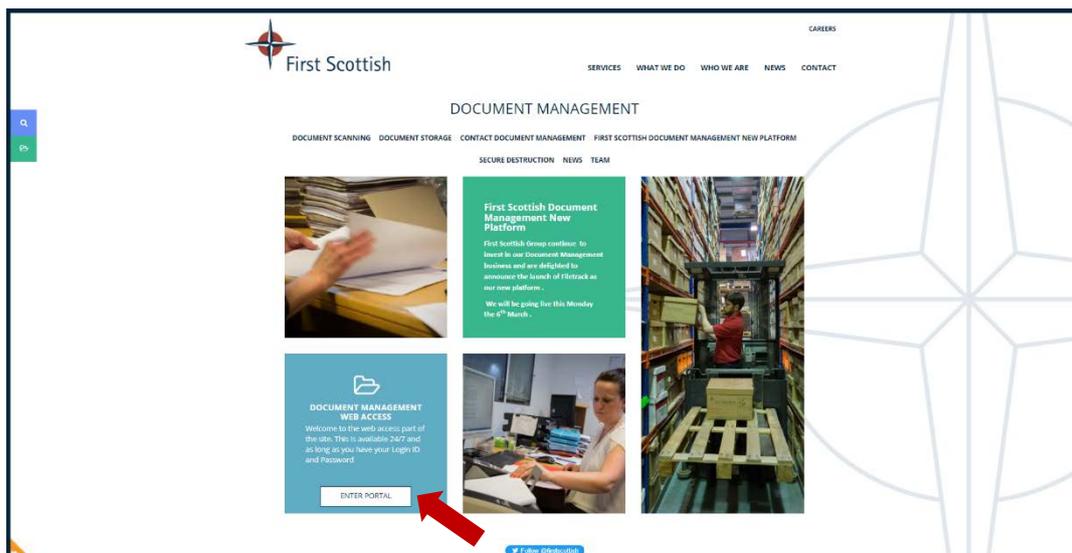
Please log onto <https://www.firstscottish.com/>

Choose Document Management below in green:

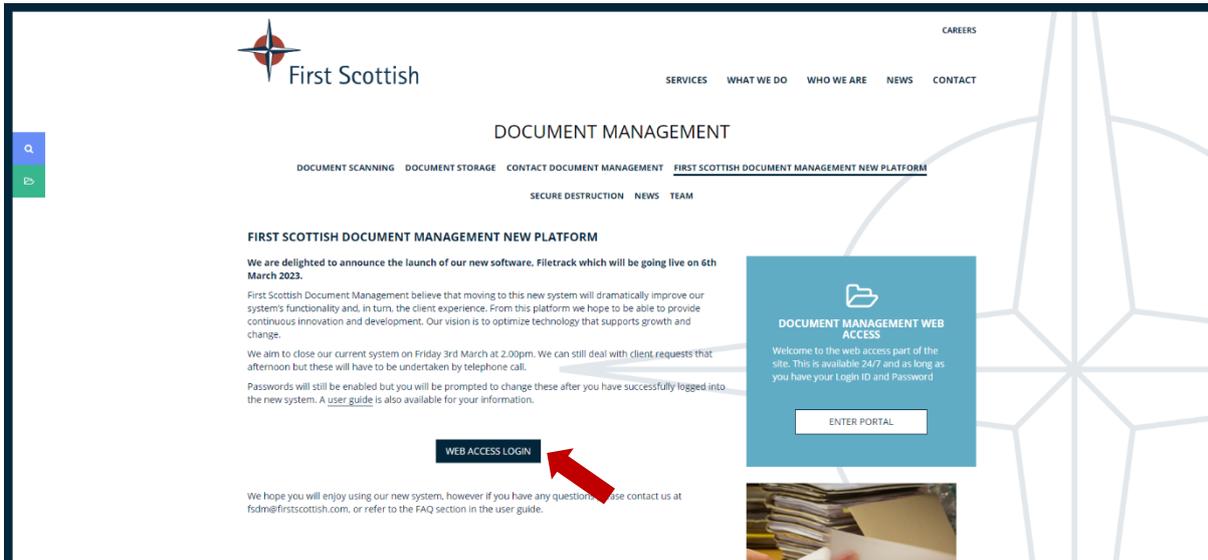


This will take you to the following screen:

Click enter portal



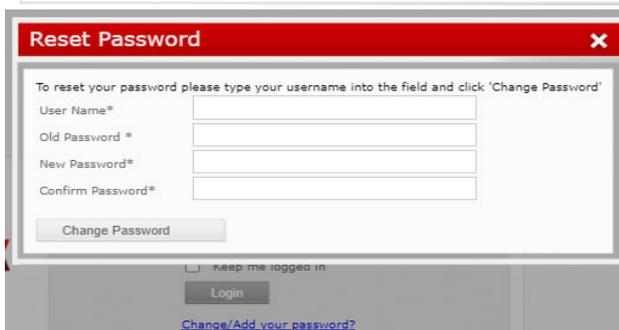
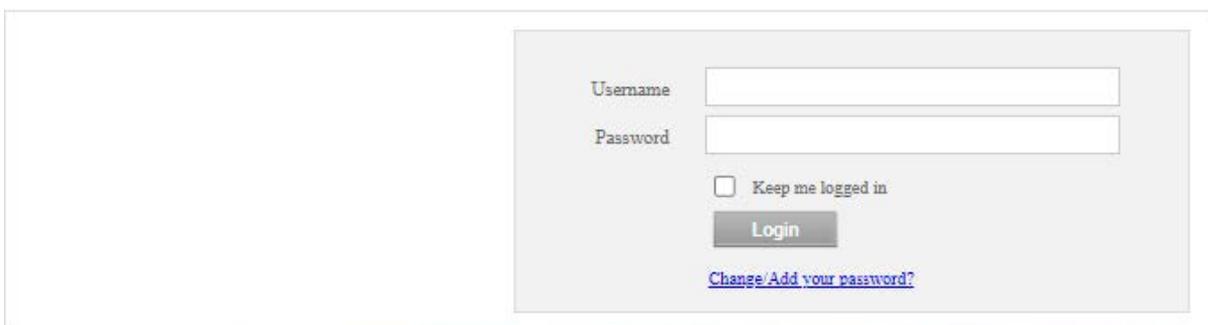
LOG INTO DOCUMENT MANAGEMENT PORTAL



WELCOME TO FILETRACK.

You will be able to use your original username and password to [Change/Add your password](#).

This will need to be at least 10 characters long.



After filling in these 4 fields and click the change password button you can now log in (above picture) using your username and new password.

SEARCHING FOR A FILE

From here you can order files to be returned to you or view scanned files with ease.

If you need to search through all your files which will include Destroyed and Retrieved files click on the blue search button.

If you only want to search for available files click on retrieve from storage.

The screenshot shows the FILETRACK web application interface. At the top, there is a navigation bar with the 'First Scottish DOCUMENT MANAGEMENT' logo on the left and the 'INTANDEM SOLUTIONS FILETRACK' logo on the right. Below the logos, there are two buttons: 'Search' and 'Retrieve from storage'. A blue arrow points to the 'Search' button. To the right of these buttons are icons for settings (gear) and power (power button). Below the navigation bar, there are icons for a printer and a scanner. The main content area is divided into several sections: 'Office' with dropdown menus for 'Office' and 'File Type'; 'Customer Information' with input fields for 'Client Name', 'Description', 'Client Number', 'Matter Number', 'Box ID', and 'Partner'; 'Box Information' with input fields for 'File Barcode', 'Box Barcode', 'Box Reference', 'Box Description', and a dropdown for 'Location Type'; and 'Other Information' with a dropdown for 'Record Status' set to 'Show only active items'. At the bottom of the form are buttons for 'Search', 'Reset', 'Load', and 'Save'.

When you choose the colour will change to Green as below:

From the drop down menu please choose File:

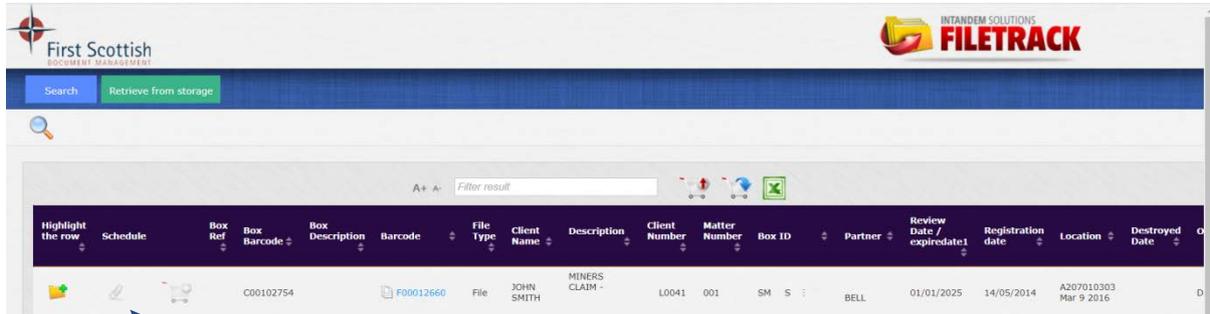
The screenshot shows the 'First Scottish DOCUMENT MANAGEMENT' interface. At the top, there are logos for 'First Scottish' and 'INTANDEM SOLUTIONS FILETRACK'. Below the logos is a navigation bar with 'Search' and 'Retrieve from storage' buttons. The main form is divided into sections: 'Office' (Office, File Type), 'Customer Information' (Client Name, Description, Client Number, Matter Number, Box ID, Partner), 'Box Information' (File Barcode, Box Barcode, Box Reference, Box Description, Location Type), and 'Other Information' (Record Status). The 'File Type' dropdown is open, showing 'File' selected. The 'Record Status' dropdown is set to 'Show only active items'. At the bottom, there are 'Search', 'Reset', 'Load', and 'Save' buttons.

You can then enter the name of the person you are looking for in the customer information section. Then choose show all items. If you cannot see anything you may need to choose the **search button** at the top. Please note: you cannot retrieve files highlighted in Pink as they're destroyed or in Blue as they're already retrieved.

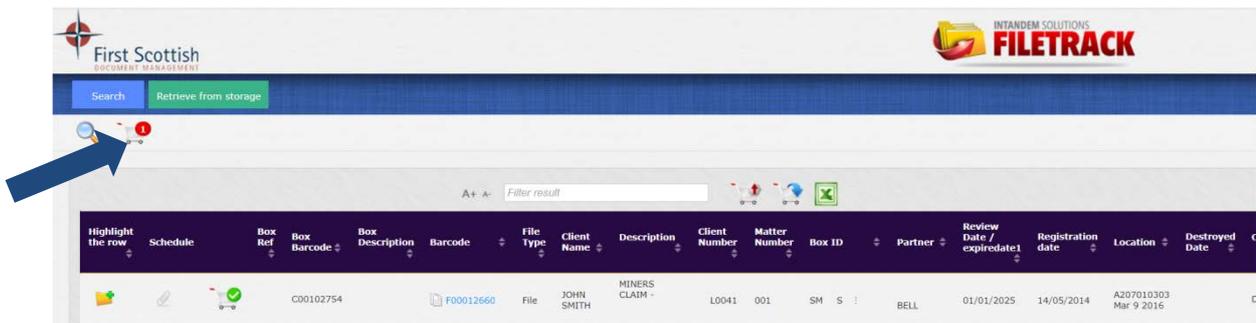
This screenshot shows the same interface as the previous one, but with two blue arrows pointing to specific elements. The first arrow points to the 'Customer Information' section, which includes fields for Full Name, Matter Address, City, Postal Code, Matter Number, Matter Description, Nil Bal CI, Comments, File Close Authorised By, and Path. The second arrow points to the 'Record Status' dropdown menu, which is open and showing options: 'Show all items', 'Show only active items', and 'Show only deleted items'. The 'Search' button is highlighted in green.

ORDER FILES FOR DELIVERY

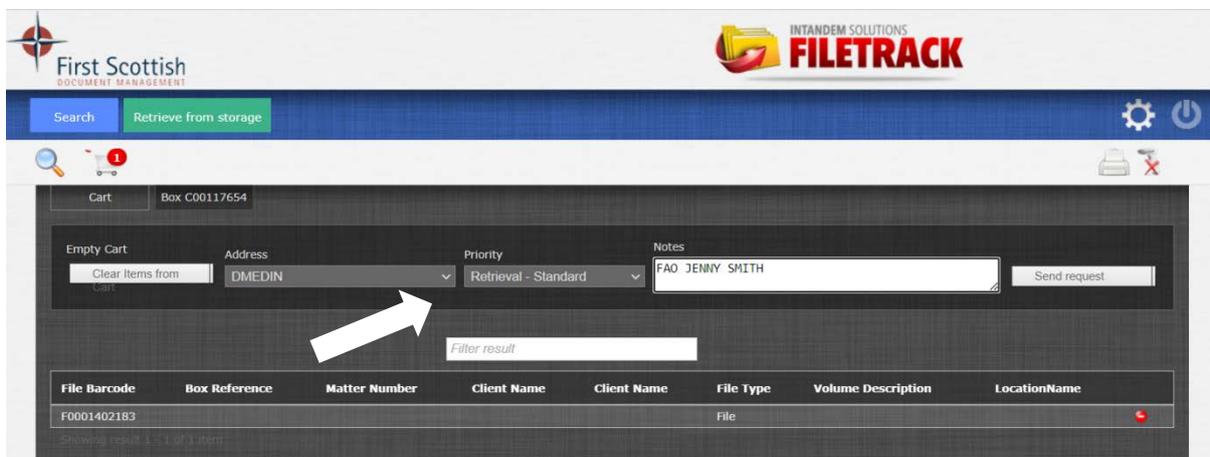
Once you find the file you require then click on the cart to add to cart:



You will then see the amount of files you have added, click on the cart to continue:

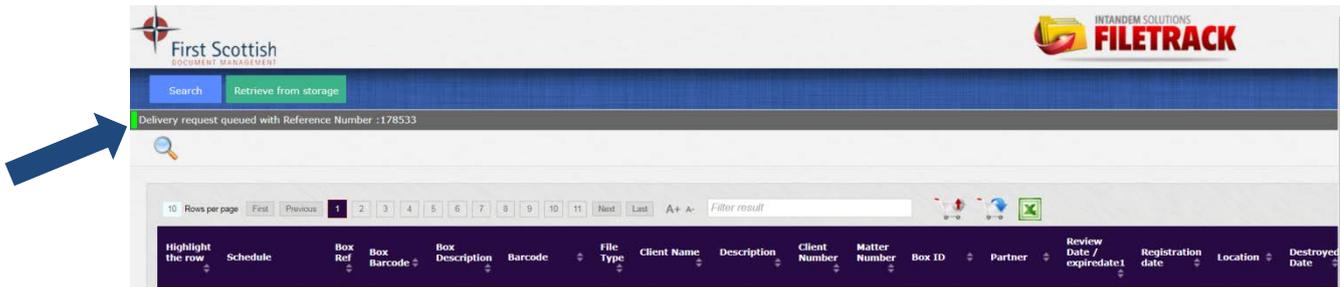


Choose address, priority and add any notes/instructions then click send request:



Please note your reference number below, this message tells you your request is now with us.

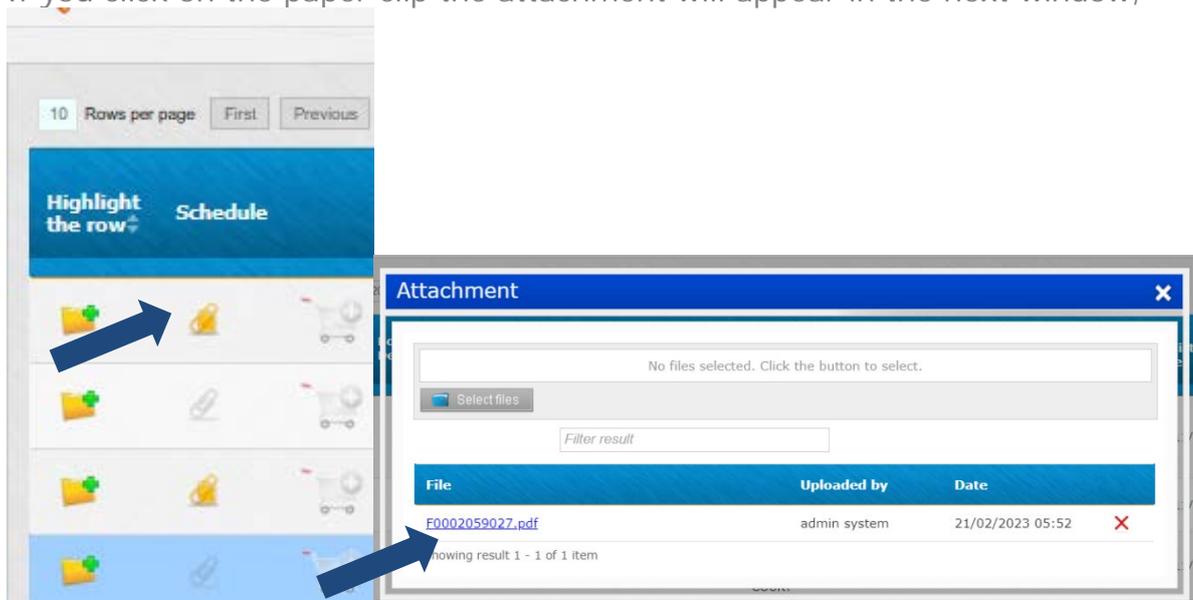
Your file will arrive the next morning.



VIEWING A SCANNED FILE.

Please follow the search steps but **do not** add to cart. Instead you will see a highlighted paperclip in yellow next to the cart.

If you click on the paper clip the attachment will appear in the next window,



click on the link then your file will automatically download into your downloads folder.

You don't need to do anything else.

If the paper clip is gray this means there is no file to view.

DESTROYED/RETRIEVED FILES

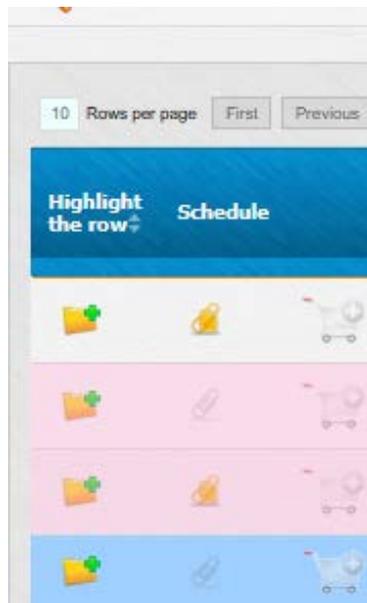
If you cannot find the file you need, choose the 'search button' in the Record status menu choose **show all items** if the file is highlighted in pink then the file has been destroyed, If its highlighted in blue it has been retrieved and will still be with you. You can still view the scanned file via the paperclip if its highlighted in yellow:

The screenshot shows the 'First Scottish DOCUMENT MANAGEMENT' interface. At the top, there are 'Search' and 'Retrieve from storage' buttons. Below this, there are several sections for filtering search results:

- Office:** Office (Please select!), File Type (File)
- Customer Information:** Full Name, Matter Address, City, Postal Code, Matter Number, Matter Description, Nil Bal Cl, Comments, File Close Authorised By, Path
- Box Information:** File Barcode, Box Barcode, Box Reference, Box Description, Location Type (Please select!)
- Other Information:** Record Status (Show all items)

At the bottom, there are 'Search', 'Reset', and 'Save' buttons. The 'Record Status' dropdown menu is open, showing the following options:

- Show all items
- Show all items
- Show only active items
- Show only deleted items



FAQ

HOW LONG DO YOU STORE DOCUMENTS POST SCANNING?

Once files have been scanned they will go to a holding area for 3 – 6 months, after this time we will contact you for permission to destroy. Please note we have limited capacity for these so if you need more time please contact us for other storage options.

WILL MY SCANNED FILE BE STORED INDEFINITELY WHEN THE PAPER COPY IS DESTROYED?

Your scanned copy will remain in Filetrack until you instruct us to delete, please note GDPR rules for this.

WHEN I SEARCH FOR A FILE, WHY IS THERE NO FILE SCANNED TO THE PAPERCLIP ICON?

If you have sent in a large number of boxes to be scanned, they are placed in a queue for scanning. We will scan several boxes a month (usually agreed in advance). Should you require a file scanned urgently please e-mail fsdm@firstscottish.com with the details and we can scan it for you ahead of the queue so you can view that day or the next morning. (file size dependant).

HOW DO I ORDER FLAT PACK BOXES OR EMPTY SACKS?

E-mail fsdm@firstscottish.com to order, boxes come in packs of 10.

I HAVE A DOCUMENT TO BE ADDED TO A SCANNED FILE, CAN I ADD IT LATER?

Yes, you can do this 2 ways. You can e-mail us the documents and we add from there or you can send the documents to **FSDM, DX558301 DALGETY BAY**. Please state the 'F00' number you would like us to add it to.

DOES YOUR SITE USE COOKIES?

Yes. We may obtain information about your use of our site by using a cookie file, which is stored on the hard drive of your computer. This helps us improve our service to you. You can disable the cookies we attach if your browser supports this. However, this may result in you being unable to use some parts of our site. Please visit our Privacy Policy on our website for further details – www.firstscottish.com.

HOW LONG CAN I BE IN FILETRACK BEFORE I AM LOCKED OUT?

You do not get locked out but you do have to refresh your screen to see up to date information (F5).

WHAT IF I SUBMIT A RETRIEVAL IN ERROR?

Call or email our FSDM Customer Liaison Team and they will be able to delete your retrieval from the system – **01383 826772** or e-mail fsdm@firstscottish.com.

WHO DO I CONTACT IF I'M HAVING PROBLEMS WITH FILETRACK?

Our Customer Liaison Team have an in-depth knowledge of our system so please call them for advice on **01383 826772**.

I HAVE LOST MY PASSWORD WHAT DO I DO?

Simply click on [Forgotten Password](#) which can be found on the front page of Filetrack.